Closing an Episode

Each episode should be closed if the client has not received services in 30 days. There are different steps to closing the episode based on the activities that have been created. If there is a program enrollment, it will need to be ended prior to closing the intake. Click on the links below to skip to the required section of the closure process.

Closing an Intake

Closing a Program Enrollment without a Treatment Level of Care (GAIN-I Assessment, Recovery Support Services or Pretreatment)

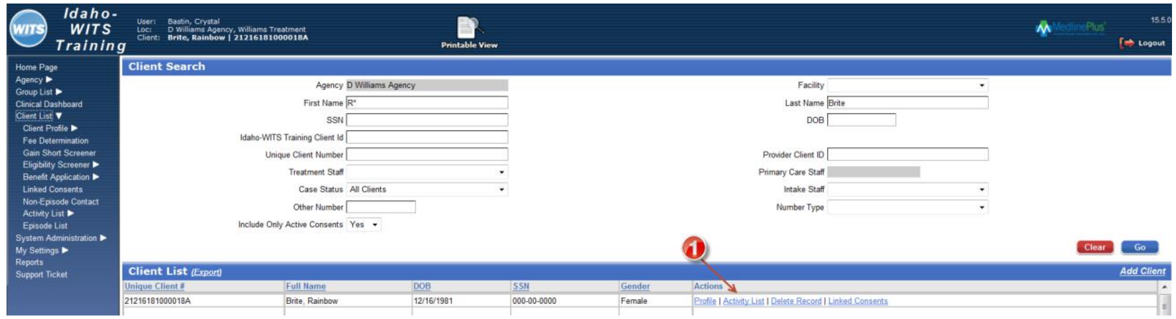
Closing a Program Enrollment with a Treatment Level of Care (OP, IOP, Detox, or Halfway/Residential/Transitional Housing)

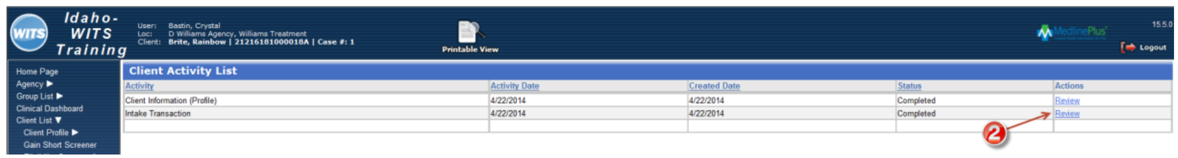
Intake

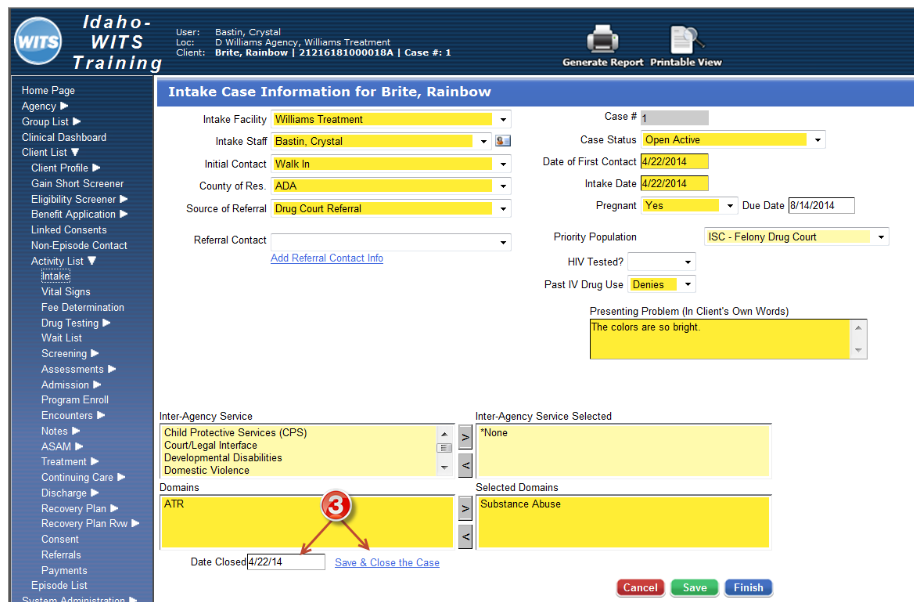
1. **Getting here:** Login, select the **Facility,** select **Client List** on the Navigation Pane (left menu) to generate the Client Search Screen, find client, select **Activity List**.

2. Select **Review** on the Intake.

3. Be sure all yellow fields are complete. Enter the **Date Closed** and select **Save and Close the Case**.





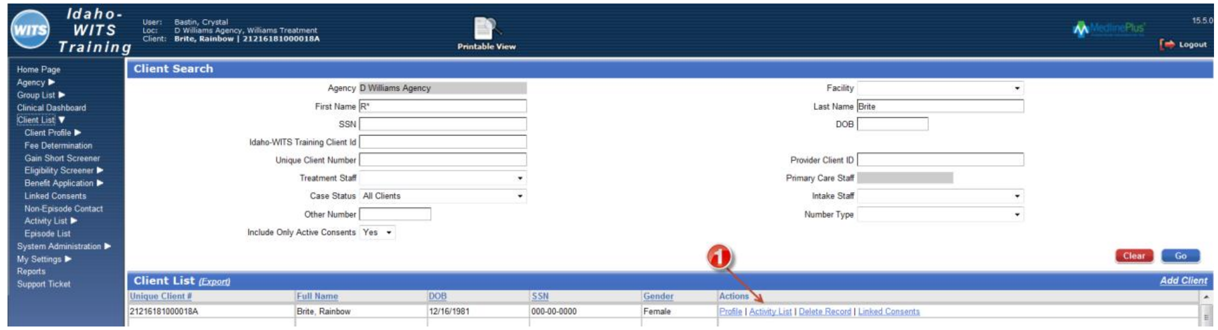


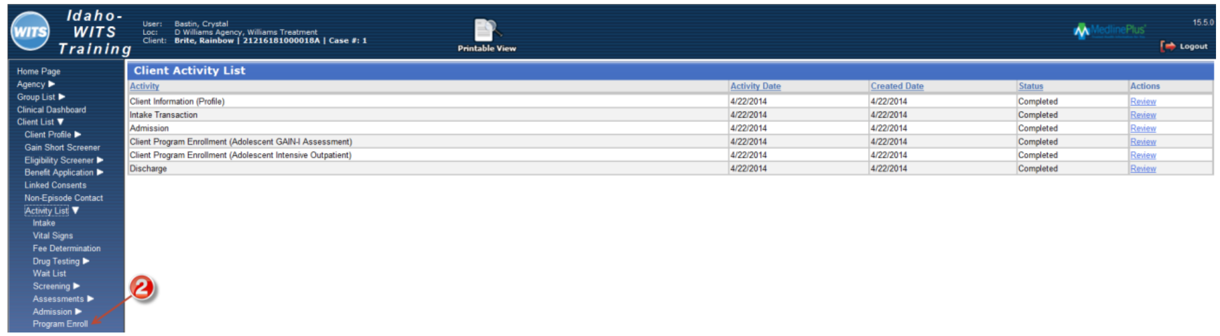
Program Enrollment without a Treatment Level of Care

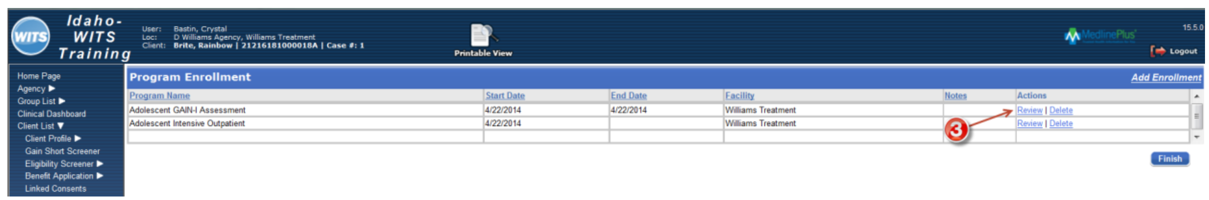
1. **Getting here:** Login, select the **<u>Facility,</u>** select **<u>Client List</u>** on the Navigation Pane (left menu) to generate the Client Search Screen, find client, select **<u>Activity List</u>**.

2. Select **<u>Program Enrollment</u>** on the Navigation Pane.

3. All program enrollments must be closed. Select **<u>Review</u>** on the GAIN-I Assessment program enrollment.





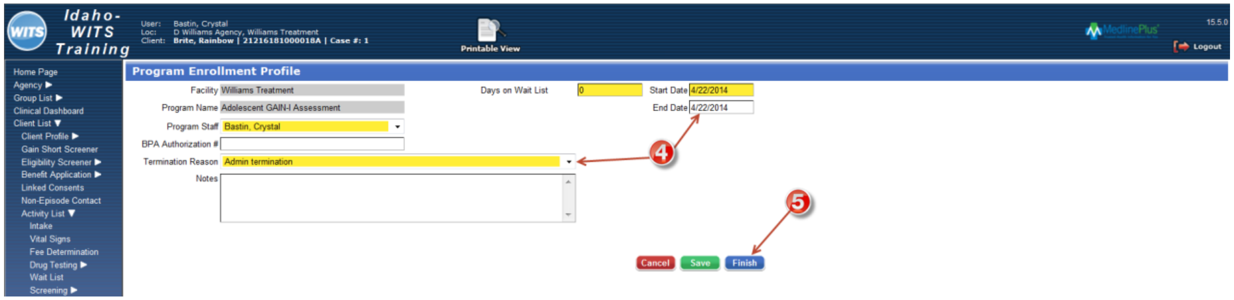


4. Enter the **End Date** and select a **Termination Reason** from the drop down menu.

5. Select **Finish.**

   NOTE: If there is also a program enrollment for a level of care (e.g. Adolescent Outpatient, Adult Intensive Outpatient) go to the Program Enrollment with a Treatment Level of Care section.

6. Follow the guidance to close an Intake.

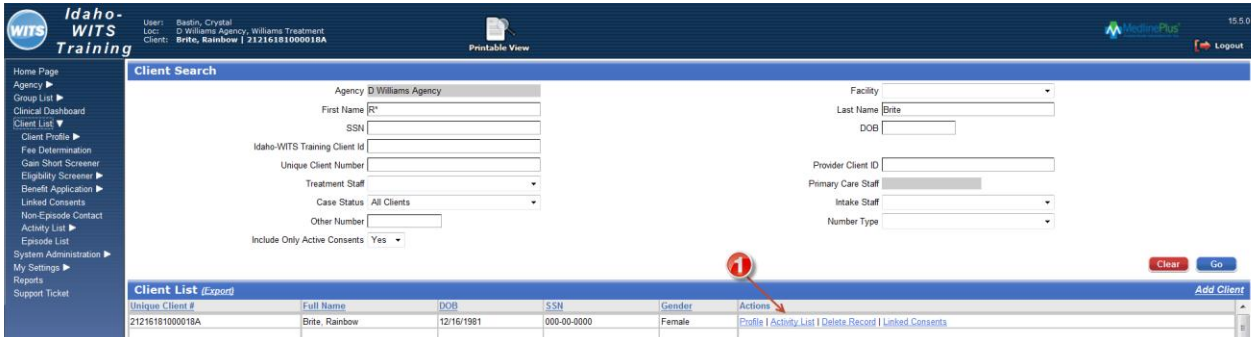


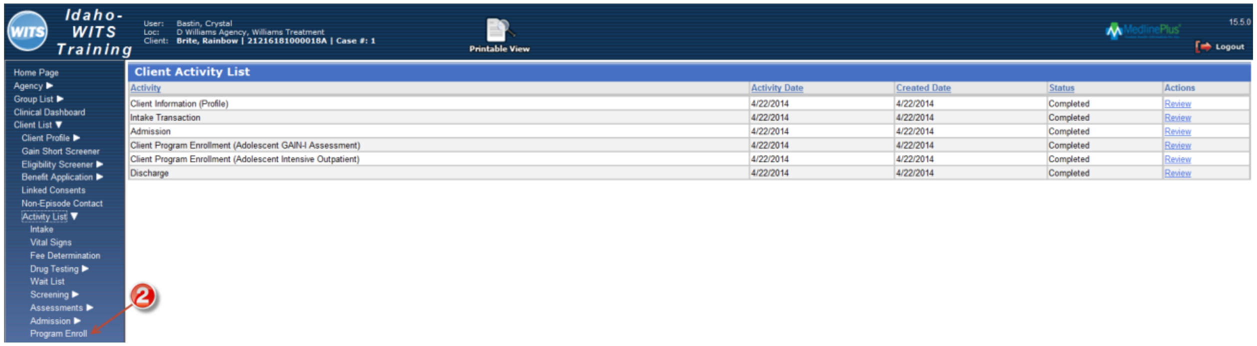
Program Enrollment with a Treatment Level of Care

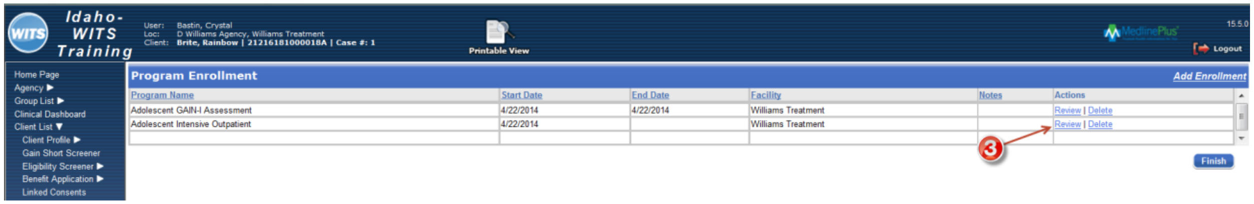
1. **Getting here:** Login, select the **Facility,** select **Client List** on the Navigation Pane (left menu) to generate the Client Search Screen, find client, select **Activity List**.

2. Select **Program Enrollment** on the Navigation Pane.

3. All program enrollments must be closed. Select **Review** on the treatment program enrollment.





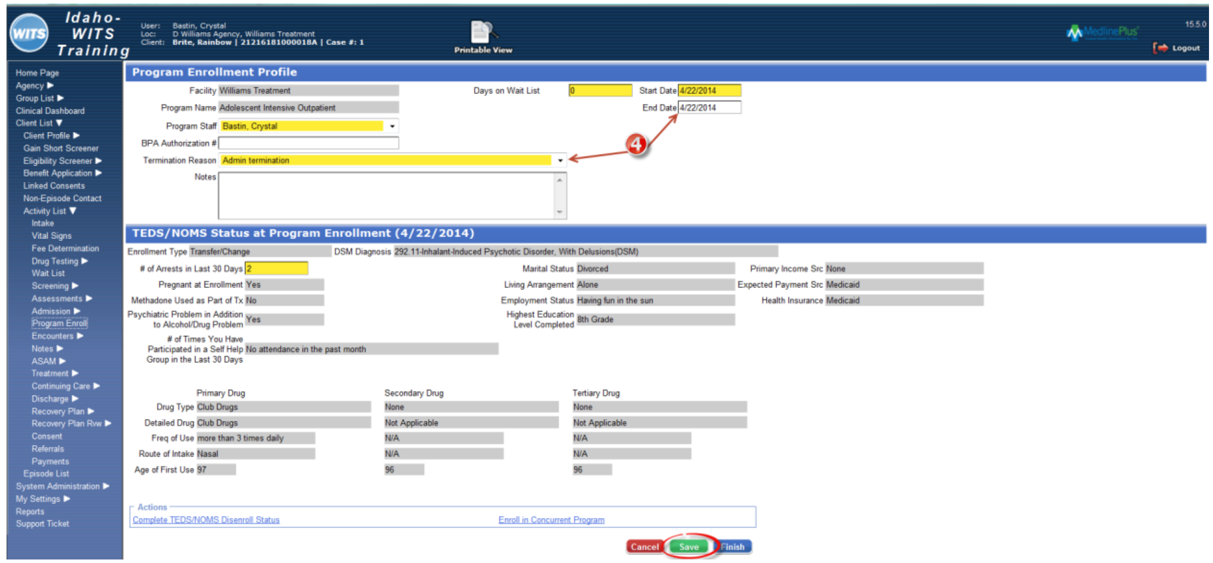


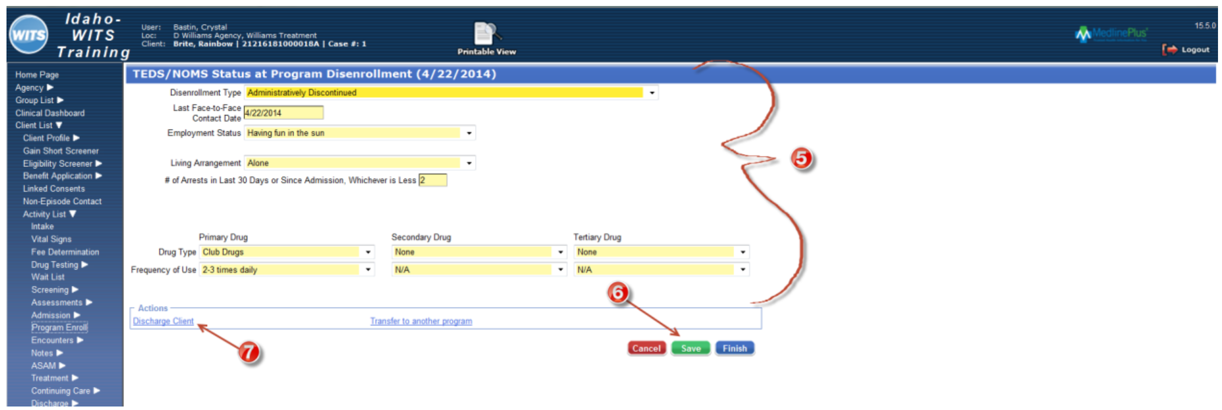
4. Enter the **End Date** and select a **Termination Reason** from the drop down menu. Select **Save.**

5. Select **Complete TEDS/NOMS Disenroll Status**.

6. Complete all of the fields. Select **Save**.

7. Select **Discharge Client**.





8. Complete the Discharge moving to each page by selecting the **Next Arrow**.

9. Once you reach the end of the Discharge, select **Finish**.

10. Select **yes**.